



County of Humboldt HMIS RFP Response

# Request for Proposals No. DHHS2023-03 Homeless Management Information System

COUNTY OF HUMBOLDT

Department of Health and Human Services  
County of Humboldt  
507 F Street  
Eureka, California 95501  
cbeck@co.humboldt.ca.us

RFP issued: **September 15, 2023**  
Proposal submitted: **October 20, 2023**

**QUOTE AND PROJECT PROPOSAL**

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# 1.0 Introductory Letter

Dear Humboldt County Review Committee,

On behalf of Bitfocus, I am pleased to submit this proposal to provide Humboldt County with an HMIS solution for the Humboldt County Continuum of Care, as well as their partner agencies, programs, and services. We are excited for the opportunity to collaborate with Humboldt County in their efforts to improve their HMIS. We believe our product, Clarity Human Services, is well-positioned to meet the needs and objectives of Humboldt County. Humboldt County will join thousands of other homeless housing and service providers across the nation who rely on Clarity Human Services as their HMIS. Together, we can prevent homelessness whenever possible and work collaboratively to ensure it is a rare, brief, and one-time experience.

Our company's journey started in 2003, when Las Vegas, Nevada, hired us as the community's HMIS system administrator. We were (and still are) on the frontlines of their HMIS—training end-users, running reports, and working shoulder-to-shoulder with CoC leadership as we fight to serve a growing homeless population more effectively.

Our legacy vendor didn't make the job easy. Confident we could do better, we built Clarity Human Services from the ground up to be the HMIS we always wanted. Clarity Human Services facilitates a client's full journey through the homeless service delivery system—connecting the dots between initial engagement, and housing placements while empowering decision-makers with actionable information for program improvement, service planning, and reporting. More than just HMIS software, it's the infrastructure upon which communities build their systems of care.

Our staff, comprising over 100 talented individuals, remains steadfastly focused on leveraging technology to advance solutions to homelessness. The depth and breadth of our policy and regulatory experience inform everything we do at Bitfocus, and we hope you see that reflected throughout Clarity Human Services.

As detailed in this proposal, our experience, qualifications, and results are among the most respected in the field. We look forward to building upon these successes by providing you with the high-quality, user-friendly, person-centered data collection tools necessary to serve your clients at every stage of need.

Warmly,



Cameron Shorkey  
Director of Business Development  
(719) 300-5522  
[camerons@bitfocus.com](mailto:camerons@bitfocus.com)

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# 3.0 Signature Affidavit

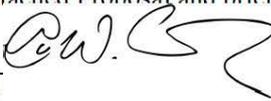
**REQUEST FOR PROPOSALS NO. DHHS2023-03  
HOMELESS MANAGEMENT INFORMATION SYSTEM  
ATTACHMENT A – SIGNATURE AFFIDAVIT  
(Submit with Proposal)**

REQUEST FOR PROPOSALS – NO. DHHS2023-03 SIGNATURE AFFIDAVIT	
<b>NAME OF ORGANIZATION/AGENCY:</b>	Bitfocus, Inc.
<b>STREET ADDRESS:</b>	5940 S Rainbow Blvd Ste 400 #60866
<b>CITY, STATE, ZIP</b>	Las Vegas, NV 89118-2507
<b>CONTACT PERSON:</b>	Cameron Shorkey
<b>PHONE #:</b>	(719) 300-5522
<b>FAX #:</b>	N/A
<b>EMAIL:</b>	camerons@bitfocus.com

Government Code Sections 6250, *et seq.*, the “Public Records Act,” define a public record as any writing containing information relating to the conduct of public business. The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

In signing this Proposal, I certify that this firm has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or agency to submit or not to submit a Proposal; that this Proposal has been independently arrived at without collusion with any other Proposer, competitor or potential competitor; that this Proposal has not been knowingly disclosed prior to the opening of Proposals to any other Proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned is an authorized representative of the above-named agency and hereby agrees to all the terms, conditions and specifications required by the County in Request for Proposals No. DHHS2023-03 and declares that the attached Proposal and pricing are in conformity therewith.

  
 \_\_\_\_\_  
 Signature  
 Cameron Shorkey  
 \_\_\_\_\_  
 Name

Director of Business Development  
 \_\_\_\_\_  
 Title  
 10/11/23  
 \_\_\_\_\_  
 Date

This agency hereby acknowledges receipt / review of the following Addendum(s), if any  
 Addendum # [ Q&A ] Addendum # [ Q&A 3 ] Addendum # [ Q&A 1 ] Addendum # [ ]

# 4.0 Professional Profile

## A. Organization Overview

**1. The Proposer's organization name, physical location, mission statement, accreditation, certification and/or licensure status, legal organizational status, such as partnership, corporation or limited liability company, current staffing levels and overall budget.**

**Company Name:** Bitfocus, Inc.

### **Location**

Headquartered in Las Vegas, Nevada, Bitfocus is a fully distributed company with staff working remotely throughout the United States. We do not maintain a physical office presence. Hailing from a diverse background of skills and expertise, our team is united by extensive human services experience and a shared passion for using technology to advance access to housing.

### **Our Mission**

***At Bitfocus, we create tools that advance solutions to our greatest social challenges.***

Bitfocus, Inc. is on a mission to empower communities nationwide who are looking for better ways to use technology, data, and policy to improve their systems of care. We're a software company committed to using data and technology to transform human services and drive positive social change. Since 2003, we've been designing, implementing, and supporting data systems that make life-changing social services possible. Our SaaS software, Clarity Human Services, is a powerful tool that connects your community's most vulnerable populations to the most effective services and resources available to them—all while streamlining the service provider workflow and providing the analytics necessary to support informed decision-making. Our team empowers communities to better leverage their resources, helping them adopt data-driven strategies in all areas of health, human, and social services.

### **Bitfocus Company Info**

Bitfocus, Inc. is a Corporation with a State of Nevada business license. Bitfocus was founded in 2003 and over the first 18 years of operations, we grew the company organically by implementing Clarity Human Services for over 50 Continuums of Care. Our organic growth has continued, and in November 2021, Bitfocus was acquired by Alpine Software Group ("ASG"), which is backed by Alpine Investors, a private equity firm with more than \$2 billion invested over the last 20 years.

We maintain a staff of over 100 full-time employees, and our customer base now includes more than 70 Continuums of Care, including seven statewide HMIS implementations.

Our annual revenues for the last three fiscal years were \$14.4M (2020), \$16.2M (2021), and \$18.3M (2022).

**2. A detailed description of the Proposer's current and previous business activities, including, without limitation: The history of the Proposer's organization, including the date when the organization was founded and how innovation and high-quality performance is fostered thereby. The total number of years the Proposer has been operating under the present organization name, and any prior organization names under which the Proposer has provided Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP. The number of years the Proposer has been providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP. The total number of government agencies for which the Proposer has provided Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP.**

Starting in Las Vegas, Nevada, we've helped government and human services organizations leverage technology to address homelessness since September 2003. We begin our work administering a third-party HMIS application, MetSyS. In 2012, we developed our own HMIS solution, Clarity Human Services, from the ground up, shaped by our frontline experience as HMIS administrators. Since then, the Clarity Human Services customer base has grown to include over 85 systems, including 70 CoCs across more than 40 implementations.

## Company Overview

Bitfocus is a software and consulting company committed to using data and technology to transform Human Services and drive positive social change. We empower communities nationwide who are looking for better ways to use technology, data, and policy to improve their systems of care.

The Bitfocus Team is an interdisciplinary collection of subject matter experts with backgrounds that are highly relevant to the customers we serve. Collectively, our staff includes dedicated data analysts and engineers, certified project management professionals, former federal technical assistance providers, certified privacy professionals, and former social workers and case managers.

Our product, Clarity Human Services, has been built from the ground up specifically for HMIS. It's an efficient, usable, and dependable software, adhering to industry best practices for web design and cloud hosting. It ensures compliance and has customizable features that facilitate case management, coordinated entry, and powerful business intelligence to help communities understand the story underlying their data.

Our Community Administration team heavily informs the development of Clarity Human Services software. We partner closely with our HMIS administration communities to meet their needs related to data collection and analysis around homelessness. In short, we use our own software in the field, and this hands-on experience with our own code shapes its development into the most powerful, productive, and user-friendly software in the marketplace.

## What makes Clarity unique among HMIS products?

The unique features that set Clarity Human Services apart from all other competitors include its Inventory Management module, Data Analysis Tool, Outreach module, and built-in APIs, each of which is expounded on below. Not only do these tools set Clarity Human Services head and shoulders above the competition—they come built into the system. As we continue to develop Clarity Human Services, our customers get to reap the benefits of this and gain access to new cutting-edge features. **Our innovative spirit is what sets us apart from the competition.**

### Inventory Management

Clarity Human Services' Inventory Management feature expands on the base HUD HMIS data standards introducing the ability to manage your physical housing inventory directly from Clarity. Communities can use Clarity to track local housing stock—including sites, buildings, units, and even potential unit configurations—leveraging inventory records to automate eligibility determinations, facilitate referrals, and monitor provider performance.

### Data Analysis Tool (Reporting)

Clarity Human Services is the only HMIS product to integrate Looker, Google Cloud's Business Intelligence solution, directly into the application. It also includes proprietary direct-database access (for connecting third-party reporting tools) and data analysis API functionality. All fields within the system can be translated to the Data Analysis Tool, making it possible to report on your data from every angle.

### Homeless Outreach

Clarity Human Services is the only HMIS product built using Esri's ArcGIS platform to support homeless Outreach. Clarity's Outreach module offers new ways for service providers to engage with clients in the field and analyze geospatial data about their unsheltered community members. Designed to support the progressive engagement of unhoused clients and street encampments, this tool allows you to track the physical movement of people and encampments over time, enabling you to understand trends, ranging from risk factors to support and service provision.

### Integration (Import, Export, and APIs)

Compared to other HMIS products, Clarity is truly an open, flexible, and secure platform for data integration. Clarity's unique data integration suite and analytical features enable administrators to safely and smoothly import and export data. Clarity Human Services is designed to enable communities to bring both HUD and locally defined (i.e., custom) client data into their Clarity Human Services solution. Clarity Human Services can securely connect with authorized

applications and schedule unattended imports into your system using the two RESTful APIs built into the system.

**3. A detailed description of any litigation regarding the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that has been brought by or against the Proposer, including, without limitation, the nature and result of such litigation, if applicable.**

**4. A detailed description of any fraud convictions related to the provision of Homeless Management Information Systems with capabilities pursuant to the terms and conditions of public contracts, if applicable.**

**5. A detailed description of any current or prior debarments, suspensions or other ineligibility to participate in public contracts, if applicable.**

**6. A detailed description of any violations of local, state and/or federal regulatory requirements, if applicable.**

**For questions 3–6:** Neither Bitfocus nor any of its principal officers have been involved in any litigation in connection with any contract. Bitfocus has never been disbarred. Bitfocus does not have any prior, current, or anticipated litigation or other actions for breach of contract or similar cases of non-compliance.

**7. A detailed description of any controlling or financial interest the Proposer has in any other organizations, or whether the Proposer’s organization is owned or controlled by any other organizations. If the Proposer does not hold a controlling or financial interest in any other organizations, that must be stated.**

Bitfocus was founded in 2003 and over the first 18 years of operations, the company grew organically by implementing Clarity Human Services for over 50 Continuums of Care. In November 2021, Bitfocus was acquired by Alpine Software Group (“ASG”), which is backed by Alpine Investors, a private equity firm with more than \$2 billion invested over the last 20 years. Bitfocus does not hold a controlling or financial interest in any other organizations.

## **B. Overview of Qualifications and Experience**

**1. A detailed description of the Proposer’s overall experience regarding the provision of Homeless Information Systems with capabilities equivalent to those set forth in this RFP, which includes specific examples of the outcomes and successes of such projects.**

Providing high-performing data homelessness data systems--including hosting, infrastructure, information security, maintenance, and support--has been our mission since the launch of Clarity Human Services in 2012. We have provided these services directly to a growing portfolio of jurisdictions ranging in size from Guam and the Northern Mariana Islands to our ~5,000 user system in Los Angeles. We boast a track record of successful data migrations and on-time compliance with all HUD data standards updates. Our 99.9%+ uptime record demonstrates the resilience of our system architecture and service protocols.

Empowered by the advanced functionality and data-driven decision-making made possible by Clarity Human Services, our growing family of community partners is transforming their systems of care and leading the national conversation shaping our response to homelessness. Quickly becoming the HMIS of choice for the nation's highest-performing communities, Bitfocus proudly partners with many of the largest continuums, including Los Angeles, San Francisco, Boston, Denver, San Diego, Las Vegas, Silicon Valley, and Seattle. We have 85+ customers and provide HMIS for over 70 CoCs across more than 40 implementations. We are the software provider for 7 statewide implementations (Wisconsin, Nebraska, Nevada, Colorado, Rhode Island, New Hampshire, and Vermont). We currently manage over 80% of the Permanent Supportive Housing (PSH) beds in California. We have been in the HMIS market since 2003, serving as the HMIS vendor for 7 of the 10 US cities with the largest homeless populations. For a list of customers that use Clarity Human Services as their HMIS, go to [bitfocus.com/customers-about](https://bitfocus.com/customers-about).

We are well-versed in completing technology projects of various sizes, scopes, and budgets. Examples include:

- **The Los Angeles Homeless Services Authority, Outreach module:** Partnering with LAHSA, we developed Clarity Human Services Outreach. Built using Esri's ArcGIS platform, Outreach offers a new way for service providers to engage with clients in the field and local policymakers to analyze geospatial data about their unsheltered community members. Outreach seamlessly combines HMIS data with street outreach efforts on a consolidated map, fully integrated with the Clarity platform.
- **Nevada, FUSE Integration project:** In partnership with the Corporation for Supportive Housing (CSH), Bitfocus created a secure means of matching and prioritizing clients involved with criminal justice, mainstream healthcare, and homeless response systems. The Nevada FUSE project identifies client engagement across systems, creating a more complete client record and prioritizing frequent users for permanent supportive housing. Playing the role of both technology provider and local system administrator for the Nevada HMIS, we were involved at all stages of project design, implementation, and review.
- **San Francisco, Bed and Unit Inventory Management module:** Partnering with the City and County of San Francisco, we developed Clarity Human Services INVENTORY. Expanding on the base HUD HMIS data standards, INVENTORY provides the ability to manage your physical housing inventory directly from Clarity Human Services. Communities can use Clarity to track local housing stock—including sites, buildings, units, and even potential unit configurations—leveraging inventory records to automate eligibility determinations, facilitate referrals, and monitor provider performance.

- **Santa Clara County, Customer Portal:** Partnering with Destination: Home and Santa Clara County's Office of Supportive Housing, we developed the Customer Portal. The Customer Portal is a secure website connected to Clarity Human Services that allows clients to view and update their HMIS information and interact with their care team members. The Customer Portal streamlines the case management process by providing a powerful new communication channel between providers and clients through tools like the message center, documentation repository, resource directory, and location sharing.
- **Santa Clara County, GraphQL API (in-progress):** Partnering with Destination: Home and Santa Clara County's Office of Supportive Housing, we're currently developing the Clarity Human Services GraphQL API. Clarity GraphQL will be a new way for authorized users to retrieve raw data from Clarity Human Services and update data in Clarity Human Services. Communities are building information exchanges in concert with local healthcare systems, and they request HMIS data and operational functionality to be included in these exchanges. Clarity's GraphQL provides a seamless interface to send and receive HMIS data to your external applications.

**2. Identification of the Proposer's management team, key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, any and all applicable organizational charts and/or diagrams.**

**Bitfocus Management Team**

**Jeff Ugai – Chief Operating Officer**

As the Chief Operating Officer, Jeff works with our customer and business development teams to help ensure we deliver a consistently exceptional experience to our customers (current and future). Jeff also serves as Bitfocus privacy officer and leads our efforts to ensure we fulfill our obligations to safeguard our client data. With focused experience in data analysis, performance measurement, and HMIS technical assistance, Jeff contributes heavily to Bitfocus efforts to facilitate local strategic planning, bringing together government, nonprofit homeless service providers, advocates, volunteers, and homeless individuals to ensure each customer's implementation operates smoothly. Jeff's past experience includes a 4-year tenure as Staff Attorney and Data and Innovations Team Lead of HomeBase, a San Francisco-based, nonprofit legal and technical assistance agency.

Jeff has also served in several HUD leadership roles, one of which being Creator and Lead Facilitator of HUD's Data-Driven Interventions Initiative, which developed systems for several high-profile communities (e.g. Las Vegas, NV and State of Washington) that leveraged existing investments in HMIS to coordinate care and share data across mainstream systems. Jeff holds a B.S. in Public Policy,

Management and Planning from the University of Southern California, and a J.D. from Hastings College of the Law, where he also served as President and Founder of the Homeless Legal Clinic. Jeff is also an IAPP Certified Information Privacy Professional and CIPP/CIPT Certified Information Privacy.

### **Education**

**Law, Juris Doctorate**, University of California, Hastings College of the Law Public Policy, Management and Planning,  
**Bachelor of Science**, University of Southern California

### **Licenses and Certifications**

Fellow of Information Privacy (FIP)  
Certified Information Privacy Professional/United States (CIPP/US)  
Certified Information Privacy Technologist (CIPT)  
International Association of Privacy Professionals.  
Active Member California Bar Association

### **Tauri Royce – Vice President of Customer Success**

Tauri Royce contributes an invaluable multidisciplinary skillset to Bitfocus and our customers. As the Vice President of Customer Experience, Tauri spearheads efforts to improve, understand, and deepen our relationship with customers and key stakeholders. Comprised of Customer Success, Technical Support, and Learning & Development teams, the Customer Experience department directly influences all aspects of how we engage our customers and the public. In her role, Tauri is responsible for facilitating the ownership of customer experience excellence throughout Bitfocus.

Prior to her current role, Tauri served as the Lead Bitfocus HMIS System Administrator for the State of Nevada for over a decade. Tauri's dedication to this role drove the expansion of the Nevada HMIS system from a 9-agency, 50-user, single CoC implementation into a statewide multi-CoC 1,400+ user system for the entire State of Nevada. She worked tirelessly to increase awareness of the CoC activities and create interest in membership and HMIS participation throughout the community. This blend of technical expertise, human services field experience, and HMIS/homeless systems experience makes Tauri an invaluable resource for other system administrators and CoC leads.

Tauri has 12 years of HMIS system administration experience, with a strong background in analytics and project management. She also has field experience, having worked with clients in senior centers and youth organizations in low-income neighborhoods within the city of Las Vegas, Nevada. This blend of technical expertise, human services field experience, and HMIS/homeless systems experience makes Tauri an invaluable resource to Bitfocus.

### **Eva Nunes – Customer Success Manager**

As the Customer Success Manager, Eva leads the Customer Success Team. This Team forms a crucial relationship as the first and most frequent contact that our customer base has with Bitfocus. The team's mission is to continuously refine strategies that enable communities to best utilize Clarity Human Services. Eva provides a range of leadership and project management support by supervising the day-to-day operations of the Customer Success team. She holds the team accountable for meeting performance metrics in alignment with key company objectives centered on service, retention, quality of service, and customer satisfaction. She assists in cultivating lasting relationships of mutual respect and trust between the customer and Bitfocus.

Prior to being the Customer Success Manager, Eva managed the implementation process for almost a dozen new Clarity Human Services customers, and she has a unique understanding of the complexities of moving to a new HMIS from the vantage point of both a customer and the vendor.

Eva's work in the Health and Human Services community began in 2008, and specifically with HMIS in 2010. She has vast experience in information systems, knowledge management, HMIS project management and leadership, and federal requirements and reporting, with over eight of those years serving as the HMIS System Administrator and CoC Lead agency for El Paso County/Colorado Springs. She enjoys evaluating business processes and identifying process improvements. Her background and education allow her to understand the challenges and opportunities our customers have and further affords her to be a great resource to our customers.

### **Education**

Organizational Leadership, Master's Degree

Information Systems Management, Bachelor's Degree

### **Experience**

12+ years

### **Jim O'Sullivan – Director of Data Services**

As Director of Data Services, Jim personally ensures that each customer has the tools they need to operate the type of data-driven culture that characterizes Bitfocus customers. He serves as the primary technical resource in developing and maintaining the Clarity Human Services data services and infrastructure, creating a master data management program to easily identify persons around which enterprise systems can be synchronized. Jim also spearheads all data visualization innovation, including the configuration, customization, and maintenance of the data visualization tool. He also oversees the data migration from legacy systems to the Clarity Human Services application and is the XML/CSV Integration and Data Exchange Lead.

Jim has over 20 years of experience in data warehousing, data integration, database administration, database development, and software development, with

12+ years focused primarily on HMIS Data Integration. Jim has used his expertise to develop scalable high-performance, high-profile Human Services databases serving millions of end users. Since becoming involved in HMIS data systems over a decade ago, he has been integral in developing Human Services data integration, data warehouses, custom programming, data quality, and client deduplication applications.

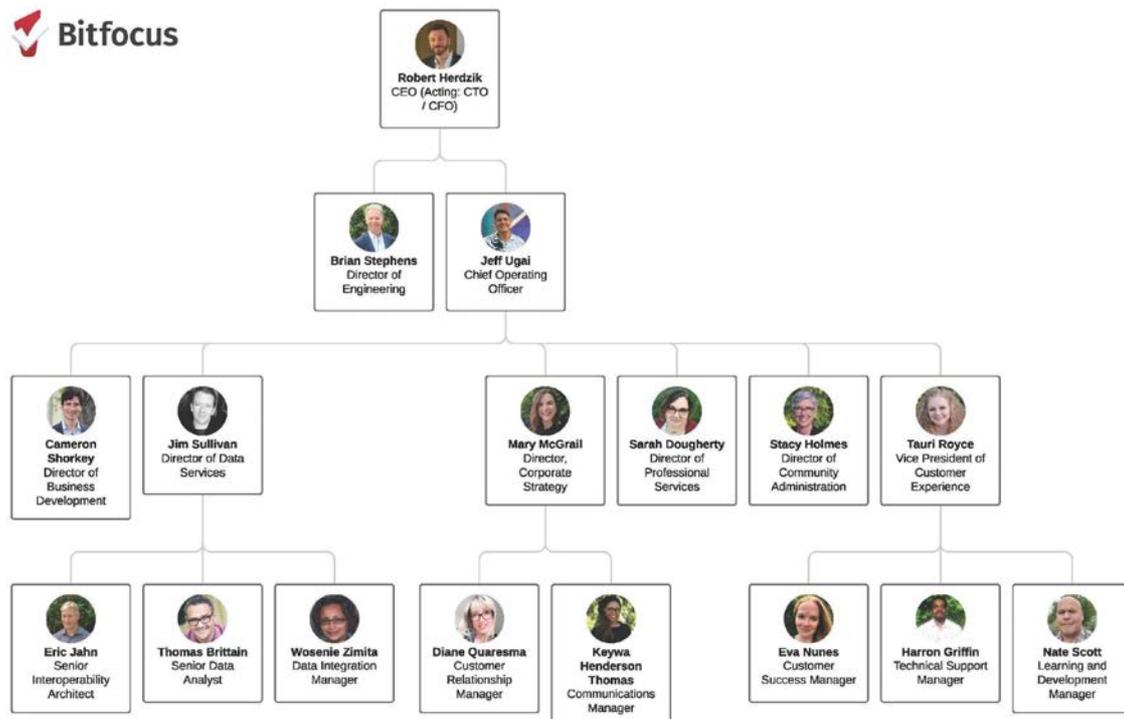
### Education

Computer Science, Bachelor of Science  
Marist College

### Experience

20+ years

## Bitfocus Organization Chart



**3. A detailed description of the qualifications and experience of key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, job titles, responsibilities, special training, licenses, certifications and experience with other governmental agencies.**

### Proposed Contract Project Team

Our multidisciplinary team of implementation professionals knows what it takes to lead a major system transition, such as this, successfully. We've built and implemented several similar instances, and we know what it takes to get things

right. As a Clarity Human Services customer, you tap into a network of specialized talent and resources with more skills and relevant experience than any community could support independently. Bitfocus does not rely on third-party subcontractors. Our team of experts includes dedicated data analysts and engineers, certified project management professionals, former federal technical assistance providers, and certified privacy professionals. Whatever the challenge, we have the knowledge, skills, and expertise to tackle it head-on.

### **Dedicated Account Manager**

Meet your new best friend at Bitfocus. Your account manager serves as a dedicated point of contact during implementation and beyond. Think of them as your Bitfocus concierge, Clarity expert, and customer advocate, all rolled into one awesome person.

### **Onboarding Advisor**

You will be assigned a designated technical advisor (s) during the implementation who will ensure everything in the new instance of Clarity Human Services is configured just right. Data and engineer staff experts will carry out the data migration and data transformations. They offer support in reporting, data quality, data management, data visualization, and more. Your implementation staff will provide a highly targeted implementation approach and timeline to guarantee a successful onboarding of new or existing agencies to your Clarity Human Services installation.

Post-implementation, you'll have access to the Bitfocus team's staff experts for any advanced projects you may need to complete. We have subject matter experts who are dedicated to providing complex customizations and project planning. You'll benefit from their broad range of knowledge and skills through their consulting, analytical, and implementation support services. Additional fees may apply.

### **Training Specialists**

We provide System Administrator and user Train-the-Trainer training sessions for the local admin team. Our dedicated learning management system (LMS) offers a full curriculum of on-demand lessons for ongoing training. The Bitfocus training development process (both pre-and post-implementation) emphasizes pedagogically sound instructional design rooted in Adult Learning Theory and continuous refinement and revision. Training modalities include in-person, video, and interactive web tutorials. As with everything at Bitfocus, training operations are data-driven; we track, measure, and monitor key learning activity elements to ensure you get the most out of all your training.

***The exact staff members assigned to each project are determined during the contracting phase. Please refer to the Bitfocus Contract Project Team in the Supplemental Documents for more information on our staff credentials.***

**4. A detailed description of how the Proposer's qualifications will help meet the County's objective of providing a high-quality Homeless Management Information System.**

We have 20 years of relevant qualifications and a consistent track record of compliance and innovation in the HMIS sphere. Please see answer #1 above for more information.

## 5.0 Project Description

### A. Description of Services

**1 A detailed description of the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP.**

There are three primary service categories included within the scope of this RFP: initial onboarding, HMIS, and ongoing support.

#### **Onboarding Services**

As part of the initial onboarding services, Bitfocus walks you step-by-step through the implementation and data migration process. We've completed dozens of successful transitions from ServicePoint to Clarity Human Services. We know what it takes to get the job done right, and you can rest assured that you will be in good hands with the Bitfocus team from day one.

#### **HMIS Platform**

We provide a reliable and secure HMIS platform for 70 CoCs across more than 40 implementations, including 7 statewide implementations (Wisconsin, Nebraska, Nevada, Colorado, Rhode Island, New Hampshire, and Vermont). Clarity Human Services has a 99.99% uptime record and top-of-the-line features to maximize your HMIS usage and meet your community where they are. Coordinated entry system management, custom report and dashboard creation, easy system configuration, and advanced data integration capabilities are just a few of the ways Clarity Human Services stands head and shoulders above other industry vendors.

#### **Ongoing Support**

Every HMIS customer receives a designated account representative from Bitfocus (your Bitfocus Best Friend, or BFF, for short) who will be the system administrator's go-to contact throughout the duration of the contract. Your BFF will routinely check in to see how things are going, keep tabs on open support tickets, and be available to help answer any questions.

System administrators also get access to our technical support team. Many of the Bitfocus technical support team members have previously been system administrators themselves or have worked in other human services roles. They're not just technical experts--they're HMIS experts. Customers love the Bitfocus technical support team, which is evidenced by its 98%+ satisfaction rating.

We also offer professional services for advanced projects that you may want additional support completing. Our staff experts routinely complete advanced projects with current customers such as custom report building, coordinated entry system redesign, and integration projects. Whatever the need, we're standing by ready to provide the support you need. A separate SOW may be required for these special projects.

**2. A detailed description of any additional system specifications, capabilities and/or services that the Proposer believes may add value to the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process.**

**Advanced Projects with the Professional Services Team**

Beyond the services we provide to all HMIS customers (as outlined in our response above), some customers opt to do special purpose projects with the assistance of our staff (i.e., advanced report development, coordinated entry system design, etc.). If the Continuum desires to do this at some point during the contract, this sort of special project would be contracted separately with our Professional Services team.

Bitfocus is well-versed in systems planning, with a Professional Services team dedicated to providing complex customizations, including coordinated entry configuration and more. This is a cross-functional team of subject matter experts that offer consulting, analytical, and implementation support services with subject matter expertise to help external and internal customers succeed. Professional Services helps customers implement and customize Clarity Human Services for their unique requirements, providing a platform from which they can dramatically improve their service delivery.

The Professional Services team is responsible for engaging and supporting the completion of many unique customer projects at Bitfocus and includes a PMO function that handles acceptance, coordination, prioritization, and the delivery of those projects to internal and external stakeholders. Our Professional Services consultants and project managers have extensive experience implementing and supporting Clarity Human Services in many areas, including implementation, engineering, data analytics, coordinated entry system configuration, software configuration, software development specification, requirements gathering, policy support, best practices implementation, federal compliance reporting, data quality, project planning, case management, and federal compliance.

## **B. Quality Assurance Capabilities**

**1. A detailed description of the Proposer's understanding of the requirements, challenges and potential hurdles applicable to the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.**

Our experience has made us acutely aware of the requirements, challenges, and potential hurdles related to the provision of a Homeless Management Information System containing the capabilities set forth in this RFP. There's a reason we're the fastest-growing vendor in the HMIS market--we are laser-focused on providing a top-tier HMIS to our customers and excellent customer support to go with it. We place a strong emphasis on continued innovation and the development of Clarity Human Services as a platform that evolves with the ever-changing needs of CoCs and homeless care providers working to end homelessness in their communities.

**2. A detailed description of the processes that will be utilized to ensure that a Homeless Management Information System with capabilities equivalent to those set forth in this RFP is provided in accordance with any and all applicable local, state and federal laws, regulations, policies, procedures and standards, including, without limitation, any and all applicable confidentiality, security and privacy requirements set forth in the California Confidentiality of Medical Information Act, the United States Health Information Technology for Economic and Clinical Health Act and the United States Health Insurance Portability and Accountability Act of 1996 and any and all applicable data collection, management and reporting requirements established by the United States Department of Housing and Urban Development.**

### A Capable Solution, Built for HMIS

#### HUD Compliance Every Step of the Way

Since its inception, Bitfocus has always served in the role of HMIS system administrator. We built Clarity Human Services out of necessity after we had spent several years hindered by the use of clunky software in our role as Nevada HMIS system administrator. Clarity Human Services has been and always will be built to meet the needs of homeless service providers.

Therefore, as we develop Clarity Human Services, HUD reporting and compliance are taken into central consideration when designing workflows within the system. Front-end experience, both with our in-house community administration team and customer feedback, combined with our heavy involvement in HMIS Vendor Workgroup and industry events (e.g., NHSDC, NAEH), result in an experience-informed software that is best-of-breed for homeless services.

Clarity Human Services has pre-built program templates that come ready-to-go and fully equipped with all Program Descriptor Data Elements (as well as UDEs) for each program type--both HUD (CoC, ESG) and Federal Partner (PATH, VA, RHY, HOPWA). These pre-built templates take the guesswork out of configuration and ensure compliance. Built-in form logic, including conditional logic and validation checks, help ensure that data collection is as accurate and complete. Communities often adjust these templates to meet their local priorities by copying the templates and then customizing them with custom fields and forms to match their workflow.

Additionally, the Clarity Human Services Report Library contains all the HUD-required and Federal partner reports, which include PDDEs. These reports are well-documented and are kept updated and in full compliance with standards. Depending on the access role, users can generate and submit these reports on-demand and with almost no processing time.

Bitfocus is fully committed to ongoing compliance with all HUD and federal partner regulations. We legally guarantee this compliance through contractual commitments in all of our standard agreements. We will maintain full compliance with current Data Standards, Programming Specifications, and other HMIS policies and regulations established by HUD and its federal partners.

### HIPAA Compliance and Beyond

When properly configured, Clarity Human Services is a fully HIPAA-compliant solution. Consistent with both the Privacy Rule and the Security Rule standard of limiting uses and disclosures of PHI to the "minimum necessary," system administrators can configure the Clarity Human Services Access Control Level (ACL) feature in ways that authorize access to PII only when such access is appropriate based on the user or recipient's role (role-based access). Role-based accesses are established by your organization's policies and procedures. By controlling access to the system's functionalities, the system administrator can thus control user access to e-PHI. Please refer to this help center article for more information: <https://help.bitfocus.com/creating-and-editing-access-roles>.

Our cloud-based system runs on Amazon Web Services (AWS), which offers a flexible, cost-efficient, and highly scalable hosting service. It meets the most stringent security and compliance requirements—including HIPAA regulations.

### California Regulations

We are the HMIS vendor for more than 20 California CoCs, and we also provide community administration services for 7 of them. As such, we are extremely well-versed in the applicable local, state, and federal laws, regulations, policies, procedures, and standards for the State of California. We are already having to factor and configure them into our other California CoC customers' Clarity Human Services instances.

### **3. A detailed description of the expected communication channels between the Proposer and DHHS – Social Services, including, without limitation, how potential problems and/or disputes will be resolved.**

In addition to our standard help desk and training resources, each community, in this case, led by DHHS, is assigned a single contact point with our Customer Success team. Your "Bitfocus Best Friend" will act as your personal advocate and guide to many resources and services available to Clarity Human Services customers. They'll keep a tab on your system and support tickets, and they'll proactively check in throughout the duration of your contract to make sure you're getting the most out of your Clarity Human Services implementation. In the

unlikely case of any problems or disputes, they will serve as your first point of contact before any other escalation would be required.

## 5.0.1 Response to Anticipated Scope of Services

### A. Provision of a Homeless Management Information System

**1. An open, flexible, intuitive and efficient workflow platform and referral tracking system that minimizes the burden on front-end users and maximizes opportunities for data integration across multiple software solutions, including, without limitation, the ability to support the latest XML and CSV schema defined by the United States Department of Housing and Urban Development.**

#### Workflow Management

The Clarity Human Services program configuration functionality allows system administrators to create a flexible workflow for any program. These workflows include the ability to collect, store, and summarize information contained across forms and paperwork for each participant.

Clarity Human Services walks users through the required data collection process for each stage of the program lifecycle, from program intake to discharge. Customizable program templates for each case type, as well as pre-built templates for all Federal HMIS Partner projects, will take the guesswork out of compliance and ensure all required data fields are collected at the appropriate time. All data entry screens are fully customizable by the system administrator—including the ability to add custom form validations and display logic to further guide and support users through the data entry process. Unique goals, funding sources, eligibility requirements, contracts, treatment tracing documents, automated service delivery, documentation upload, attendance tracking, and a myriad of other configuration options ensure that the program is set up and configured in a method that ultimately leads to better data quality and performance analytics.

Additionally, Clarity Human Services offers the flexibility to configure multiple assessments and assign them to programs. You can use assessments to measure client status as well as ongoing progress longitudinally over time.

With Clarity's workflow-creation tools and flexible, custom reporting capabilities, system users can quickly generate progress and case reviews and share them with anyone they choose.

#### Referrals

Clarity Human Services includes a complete referral system with robust tracking and reporting. Referrals are made and accepted or denied within a few simple clicks. Clarity Human Services allows for both manual referrals, as well as automated referrals based on customizable requirements. Clarity Human Services includes the tools required to determine eligibility at both the client and project levels. Our assessments (custom or standard), tracked characteristics feature, program eligibility engine, and other reports and tools quickly determine a client's eligibility as they go through the assessment process. From the project level, the Eligibility Engine automates program eligibility screening and aids housing navigators in quickly screening to identify eligible clients for particular programs.

Custom status tracking and user alerts are available through the Referral Notification and Intersystem Messaging features. Also, referral-specific case notes, a full referral history, and automated eligibility screening facilitate secure collaboration between housing navigators and provide an ideal platform for case conferencing. Caseworkers can also track status changes via the Data Analysis Tool, and users can automatically send alerts to designated contacts based on custom triggers.

## HUD XML and CSV Schema

We are committed to ensuring Clarity Human Services is an open, flexible, and secure platform for data integration with a variety of partners, stakeholders, and systems of care. Our Data Import Tool and Data Analysis APIs provide a robust toolkit for programmatic access to the HMIS—without limits on frequency or volume. All of our standard contract agreements include commitments to support the latest HUD CSV and XML schemas. System Administrators can use these formats to export or import data without the need for professional services or per-integration maintenance costs.

## **2. A user interface that is easy to navigate and provides consistent page views on a variety of devices, including, without limitation, mobile applications.**

User interfaces are clean, modern, and easy to use. The system is consistent in the user interface, and functionality: buttons, terms, functions, placement, movement, and transitions look and work the same from any point of entry. The use of common UI elements makes the end-user feel more comfortable and enables them to complete tasks quickly and efficiently.

Clarity Human Services is a web-based product and can be accessed from any device that supports a modern web browser. There is no separate mobile app to download. Mobile users enjoy full access to the data system functionality, including direct document upload options and several additional mobile-specific features such as signature, photo crop, and location capture that take advantage of mobile devices' unique capabilities.

Clarity Human Services features a dedicated mobile outreach and encampments tool to support outreach providers working with encampments and other

difficult-to-serve populations. This functionality allows you to track encampments as well as individuals who live outside of an encampment. Authorized users can also complete Coordinated Entry assessments and, where appropriate, reserve housing and service resources from the field.

### **3. Capacity for document generation, including, without limitation, readable, printable blank forms and completed forms**

The Clarity Human Services help center includes customizable, printable form templates for communities to use. You can also create your own custom forms that can be completed electronically or printed directly from the client profile. For machine-readable forms, our Data Import Tool and APIs offer integration options to connect a variety of third-party document processing solutions.

### **4. Secure upload storage for a variety of different documents, including, without limitation, consent forms, verifications, rental agreements and stabilization plans.**

Users can upload photos, scans, and other documents into a client record. They can also scan documents (either on a mobile device or external scanner) and upload them directly to a client record using the web photo upload feature. This same feature also allows users to quickly take and crop photos from within the Clarity Human Services application, eliminating the need to upload photo files for a client profile photo.

To facilitate referrals, System Administrators can designate the types of documents required for program enrollment. From there, Clarity Human Services automatically flags clients as "Document Ready" when their record contains all required document types.

There are no storage limits for files uploaded to the system. All files uploaded to the system, whether to the client record or to a specific agency, are encrypted at levels that exceed industry standards. By default, all Clarity Human Services traffic is 2,048 bit SSL encrypted at transit and at rest.

Alternative to uploading files, authorized users can create custom PDF document templates that are both readable and printable, and also include an electronic signature. This is an excellent option when translating paper forms to electronic format.

### **5. Built-in measures to prevent data entry mistakes and back-end reporting to identify data entry errors and guide data cleanup.**

#### **Data Validation and Conditional Logic**

Data Validation is available for any data field in the system and can be applied to any screen type, including assessments (custom or core HUD). System administrators can make individual data elements, *Required* (i.e., mandatory), *Soft Required* (i.e., optional), or *Not Required* (i.e., also optional). If *Required* or *Soft-Required* fields are not completed during data entry, the system prompts the user to complete these fields. *Soft-Required* fields will still allow the user to continue

(albeit with the visible warning), but *Required* fields will not allow the user to save the form without completing the field.

Configurable conditional logic (i.e., display constraints) ensures accurate data entry into Clarity Human Services. It also removes or 'hides' excess data fields that do not apply to the client, allowing users to enter meaningful data. With display constraints, system administrators can control how fields display on screens based on responses entered in previous fields. For example, if a user marks that the client is a veteran, then additional veteran status questions will also appear. However, if the user records that a client is not a veteran, those additional questions will not appear.

Any field in the system can be used as a constrained field or a constraining field. Additionally, Clarity Human Services is equipped with Advanced logic. This allows 3 or more constraints to be added to a single field using nested AND/OR conditions. You can also customize and add specific warning labels to screens based on client responses.

**6. Software with case management tools for recording various different data types, including, without limitation, case notes, follow-up instructions and queries on no contact within a certain number of days.**

#### Caseload Tab

Clarity has a dedicated caseload tab, which is a section dedicated to the caseworker, providing a convenient, searchable list of only active programs and clients/households that are assigned to the case manager's profile. Caseload and enrollment-based reports are also available in the Report Library or queryable from the Data Analysis Tool. User-specific dashboards, alerts, and notifications provide the opportunity to ensure the proper review of a client's progress through services.

#### Case Notes

Clarity Human Services enables the use of Notes in at the client, referral, program, and service level. All client case notes are accessible (depending upon their security settings) in the Client History tab as well as through each modality (the specific referral, service item, or program). Access roles and agency sharing settings ensure that client note management is secure and the client privacy protected.

#### Notifications and Alerts for Case Managers

Clarity Human Services provides a secure environment for communication and collaboration that meets or exceeds local, state, and federal standards. Configured properly, the application is compliant with both the Health Insurance Portability and Accountability Act (HIPAA) and 42 C.F.R. Part II. There are several ways that users can track to-do lists, schedule appointments, and set reminders:

- **Client Appointment Scheduler and Appointments Report:** Event reminders can be created using the Appointment tool and synced securely to the staff member's calendar. Reports and dashboards can also be generated to view the list of appointments for a specific client.
- **Calendar:** Clarity Human Services also offers an integrated Calendar, which may be subscribed to through an external email client such as Outlook. The Calendar feed also contains links directly to client programs and services. For example, a staff member can set a due date for reassessment for a particular program. The link will automatically appear on the calendar when the assessment is due.
- **Daily Reports:** Also, if the Case Plans are generated through assessments, daily automated reports can be designed with date fields such as Follow-Up and Next Appointment Date, etc.
- **Referral Notifications:** Clarity Human Services also includes customizable referral notification alerts that can be delivered either via in-app message and/or external email (without client PII).
- **Status Assessment Due Notification:** These alerts specify staff when a client assessment due date nears. An Assessment Due notification appears in the right sidebar of the Program tab in the client record. The system can also be configured to send the caseworker an email reminding them of the status assessment.
- **Client-Level Public Alerts:** End users can create Public Alerts to alert other users to any pertinent information regarding the client (e.g., they have mail, or they're up for housing). These Public Alerts attach messages/notes to the client record itself (rather than a specific staff member(s)).
- **Internal Messaging:** Clarity Human Services is equipped with an internal messaging system that allows staff members to securely communicate with other staff members. Systemwide emails are accessed here as well.

### **7. Matching functionality and deduplication measures to identify and prevent duplicate client entries across agencies.**

Clarity Human Services has built-in controls to minimize data duplication and incongruence, and no pre-configuration is necessary by the HMIS Lead. The system automatically detects duplicate criteria and prompts the end-user to open the existing record instead of creating a new duplicate record. Each Clarity Human Services installation has a Master Client Index, and the system identifies client records based on a unique identifier that is assigned at record creation. The system then uses a background script to check for duplicate records on profile creation and link these records through the common unique identifier. In addition to flagging and preventing duplicate records, this allows system administrators to maintain privacy and sharing obligations while providing deduplicated client counts for system-level reporting.

The system administrator can also easily scan the system for duplicate records using an agency-based report that provides a list of duplicate clients in that

agency. For more detailed reporting, users can search for duplicates and analyze the system for potential errors using the Data Quality data model in Clarity's business intelligence tool.

## **8. Functionality to support the batch import and export of data from agencies who enter program data into a separate system.**

### **Data Integration: Getting Data In and Out of the System**

We are committed to ensuring Clarity Human Services is an open, flexible, and secure platform for data integration with a variety of partners, stakeholders, and systems of care.

Clarity Human Services offers multiple ways of importing and exporting both HUD as well as community-defined data elements. Options include:

- **HUD CSV/XML Formats:** Standard HUD CSV and XML are included in the Report Library. Both formats can be uploaded using our Data Import Tool (DIT) (additional fees apply for this tool). HUD XML data can also be imported using the Clarity Human Services API.
- **Custom Data:** Custom data can also be imported via the Data Import Tool (DIT); we extend the HUD XML schema to accommodate custom data elements. Authorized users can use the Data Analysis Tool to create custom export schemas in a variety of formats for one-time or scheduled export.

### **Automating and Scheduling Imports and Exports**

We offer several ways to automate or schedule imports and exports of data via Clarity Human Services. Options include:

### **RESTful Data Import and Data Analysis APIs**

Our Clarity Human Services and Clarity Human Services Data Analysis APIs offer programmatic access to data import and exports using a standard RESTful architecture. Clarity Human Services includes two APIs that support integrations with other systems and applications. Both APIs utilize a RESTful architecture and are well-documented in our online help center.

- **Clarity Human Services API:** Our Clarity Human Services API allows for the import and export of HUD HMIS XML and custom fields using a standard RESTful architecture.
- **Data Analysis API:** Our more flexible Data Analysis API allows for programmatic access to the business intelligence and ad-hoc reporting tools built into Clarity Human Services.

### **Additional Methods**

- **Customer-Defined Exports:** Authorized users can use our Data Analysis Tool to create automated exports (including regular SFTP uploads) of custom CSV schemas.
- **Customer Data Model:** Advanced users can use our Customer Data Model to script their own data pulls directly from their dataset.
- **Professional Services:** For advanced integrations, our Data Services team can create a custom ETL solution. This is an excellent solution where complex business rules of unique use cases apply. Additional fees apply.

**9. Functionality to support a coordinated entry system, including, without limitation, availability of the VI-SPDAT, with the ability for local customization of a common assessment tool, a robust referral notification system and the ability to view client's VI- SPDAT score within the client record.**

**An End-to-End Coordinated Entry Solution**

An effective Coordinated Entry system is the cornerstone of a community's collective response to homelessness. Bitfocus has developed, and continues to refine, a versatile set of tools to assess, refer, and connect individuals and families with housing resources to accommodate the new coordinated entry data standards and the variety of ways communities have implemented coordinated entry. We designed these tools to be flexible enough to use with the most common coordinated entry processes, local custom tools, and best practices. Clarity Human Services is an end-to-end solution for coordinated entry. **For us, coordinated entry wasn't an add-on module or an afterthought. We built Clarity Human Services upon the concept of coordinated entry assessment and referral. Thus, the system provides the underlying structure that CoCs need to generate CE reports with clients ranked by vulnerability score, the ability to generate by-name lists by special population, and much more.**

**Assessment**

The VI-SPDAT and other OrgCode assessments come prebuilt into the system and are kept updated by our staff. System assessments like the VI-SPDAT can be duplicated and customized to meet community-specific requirements. There is also the option to build custom assessments entirely from scratch—including developing your own custom assessment scoring processors.

**Referral**

Clarity Human Services allows for both manual referrals as well as automated referrals based on customizable requirements. Clarity Human Services includes everything required to determine eligibility at both the client and project levels. Our assessments (custom or standard), tracked characteristics feature, program eligibility engine, and other reports and tools quickly determine a client's eligibility as they go through the assessment process. From the program level, the Eligibility Engine automates program eligibility screening and aids housing navigators in quickly identifying eligible clients for particular programs.

## Maximize Outreach

Go paperless with the ability to capture signatures, photographs, and locations in the field. Clarity Human Services gives providers relevant and direct access to the HMIS tools they need directly from the field. With Clarity's Outreach module, outreach workers can complete client intake and connect clients to services as close to initial client engagement as possible, bringing clients into the coordinated entry system from the start. Built off the industry-standard ArcGIS® platform, Clarity Human Services includes support for geographic information, and it includes built-in geospatial analysis. Our Location and Outreach features offer location-centered navigation for service providers, while our custom location fields and location-aware services provide geographic context to the homelessness data collected in HMIS.

## Facilitate Engagement

Clarity Human Services supports a progressive engagement model. Start with what you have and, over time, develop the relationship and the client record. Track service transactions without a complete client record. Overlay maps, integrate outside data sources to set the stage for client engagement, and direct outreach teams to areas of most intense need.

## Powerful Assessment and Referral

- Locally configurable prioritization tools and automatic eligibility screening
- **Customizable and Stackable Score Processors:** Use preexisting assessment score processors or create your own to match local priorities, including the ability to assign custom scoring to fields and sections of assessments.
- **Case Conferencing:** Referral-specific case notes, an entire referral history, and automated eligibility screening facilitate secure collaboration between housing navigators and provide an ideal platform for case conferencing.
- **Customizable Waitlists and Dashboards:** Customize Coordinated Entry waitlists and create custom dashboards that combine assessment scores with other data elements (including support for custom fields).
- **Real-Time Inventory Management and Reservations:** Understand current and anticipated availability with real-time bed and unit inventory management—including support for reservations to prevent duplicate referrals to the same resource.
- **Secure Document Storage:** The Referrals section allows for documenting client-specific attributes such as subpopulation type, ADA needs, etc. Documentation-ready status can be fully automated by the system and can also be used as a program eligibility factor. Once the system detects that a client record contains all the required documents for a specific program, it will label the client as 'document ready,' alerting the navigator that this client is ready for placement.

- **Referral Notifications:** Upon referral, custom referral notification alerts can be automatically delivered via in-app message and/or external email (without client PII). For more advanced applications, our API can be used to power notifications via third-party providers such as Twilio.
- **Nimble Referral Fields:** Users can reject a referral with a documented reason using a simple dropdown menu.

### **Prioritization: Go beyond the by-name list with housing ladders**

In addition to a primary customizable prioritization tool, Clarity Human Services allows for multiple waitlists to facilitate complex referrals and transfers within the queue(s) for situations with acuity drops (e.g., someone goes from PSH to TSH).

### **Compliant with the Coordinated Entry Data Standards**

Each community approaches coordinated entry a little differently. That's why Bitfocus has designed coordinated entry tools to be flexible enough to use with the most common coordinated entry processes as well as local custom tools and best practices. Your community will determine its coordinated entry workflow, and then Clarity Human Services can do the rest.

### **Tracking CES Placements and Performance**

Clarity Human Services has numerous ways to monitor CES activities in the system, with special emphasis on reporting for the VI-SPDAT.

#### **Client-Level Scores**

At the client level, all coordinated entry assessments, including the VI-SPDAT, are readily available for review from several areas of the client record, including the Assessment History and Client Tab section of a client record.

#### **Prebuilt Reports**

Clarity Human Services has several prebuilt CES reports that provide client-level CES Assessment details, including demographic information and referral-specific information such as assessment sub-scores and days pending on the community waitlist.

#### **Data Analysis Tool**

The Coordinated Entry Model provides the following features and information centered around client assessments (custom and VI-SPDAT) and referrals:

- Prebuilt Table Calculations
- Custom Fields
- Custom Filters
- Prebuilt Dashboards and Visualization Options

We designed this model specifically for monitoring coordinated entry and CES Assessment information.

## Aggregate-Level Scores

### Prebuilt Reports

In addition to client-level reporting, the Clarity Human Services Report Library includes multiple aggregate reports that provide insight into the performance and outcomes of coordinated entry at the system, agency, and program levels.

### Data Analysis Tool

Likewise, the Data Analysis Tool makes quick work of aggregate-level coordinated entry reporting, including support for funder and publicly accessible dashboards that provide insight into system performance while preventing access to sensitive Personally Identifiable Information (PII).

**10. Functionality to ensure the protection of client confidentiality in accordance with any and all applicable local, state and federal laws, regulations, policies, procedures and standards, including, without limitation: multi-factor user authentication with concurrent access prohibited; virus protection with auto-update; servers that include data and transmission encryption; public access and location controls; backup and data disaster recovery; secure disposal; automated monitoring, audit trails and access logs; access restrictions based on user role and/or access level, including, but not limited to, reporting, data sharing and export features; and FIPS 140-2 or greater security functions as described in National Institute of Standards and Technology Special Publication 800- 140Cr1.**

### System Security

Bitfocus knows that the success of any HMIS depends on the system's ability to make data available while ensuring the data remains secure, confidential, and only accessible by authorized users. We're able to maintain 99.99% uptime while maintaining industry best practices for data security and encryption. We designed our Clarity Human Services software with a modularized component structure, ensuring a highly scalable, fault-tolerant SaaS application. Its **cloud-based infrastructure runs on the AWS cloud**, taking advantage of the High Availability system the cloud offers. Built-in automated alerts notify Bitfocus engineers of any system outages so that they can respond promptly. There is minimal downtime with Clarity Human Services as it is built from a single codebase and all updates are pushed via the cloud infrastructure. **The system can be configured to comply with applicable local, state, and federal laws, regulations, policies, procedures, and standards from day one.**

- **Encryption:** By default, all Clarity Human Services traffic is 2,048 bit SSL encrypted at transit and at rest. All API traffic must be further AES encrypted.
- **Retention Period:** Backups are retained for up to 11 months.
- **Data Storage:** We use a secured AWS S3 bucket for backup storage.

Clarity Human Services is SOC Type II certified. Additionally, the Amazon Web Services (AWS) infrastructure itself holds the following certifications: SSAE 16

and ISAE 3402 Service Organization Control (SOC) 1 Type II, SOC Type II, and SOC 3 reports; and is compliant with the PCI DSS, HIPAA, ITAR, and NIST 800-53. For more information, go to [trust.bitfocus.com](https://trust.bitfocus.com).

### User Authentication

HMIS Leads can supplement standard user credentials with a Two Factor Authentication (2FA) requirement for added security. When enabled, multi-factor authentication requires users to provide both their password and a second authentication factor. One available method is using an authenticator device or application that generates a changing, one-time password a user must enter in addition to their usual login details. Clarity Human Services supports any authenticator that uses the Time-based One-time Password standard, such as Google Authenticator.

SSO capability is available. Additional fees apply.

### Staff Confidentiality Training, Agreements, and Auditing

We conduct pre-employment background checks, verify references, and rigorously vet new hires before extending job offers. Once employed, Bitfocus staff training includes a review of our data privacy obligations as well as the material and requirements of our Information Governance and Information Security policies. Employees with access to customer data are required to sign confidentiality agreements, and their use of the system is logged for auditing purposes.

### Client Confidentiality, Consent, and ROIs

Clarity Human Services includes a flexible set of tools to manage consent. Release of Information (ROI) forms, including e-signature, can be compiled, stored, and managed from within the client record. This includes the ability to de-identify/segregate the records of non-consenting clients, automatic expiration reminders, and a full audit trail for the consent form.

### Data Sharing Management

By default, Clarity Human Services enables system-wide sharing, meaning the client record is shared with all agencies' staff members. However, custom sharing profiles can be created and assigned at the agency and department levels. There are four categories of settings that can be adjusted to control the way agencies share and view client data: Sharing Defaults, Sharing Groups, Agency Exceptions, and Departments.

- **Sharing between agencies:** System administrators can allow agencies to share data uniformly with all other agencies using the Sharing Default Group. By default, all agencies are assigned to the Sharing Default group. If a system administrator wants to override the Sharing Default Group to

share specific types of client data with another agency or groups of agencies in specific, customizable ways, they can use the Sharing Groups feature. Further, sometimes an agency will want to share data differently with one or more agencies within that Sharing Group; system administrators can use Agency Exceptions to accommodate this.

- **Sharing between programs and services within a specific agency:** Agencies with multiple programs and/or services can use Departmental Sharing to secure each program and/or service independently. Any combination of departmental data restrictions can be assigned to users with departmental access, such as the ability to view program/service history, case notes, and client files within that program.
- **Sharing data fields or certain portions of the client record:** For more granular control, privacy flags on sensitive data fields, notes, files, or entire client records allow for excluding individual data elements of a specific client record from general sharing/access agreements.

### Role-Based Data Access

In Clarity Human Services, system administrators can manage user roles by creating and assigning access roles to control permissions to the system. The built-in Access Control List (ACL) model provides granular-level permissions to all areas of Clarity Human Services. Individual access roles are assigned to users to dictate which areas of the system they can view, what they can read/write/edit/delete, and how those roles relate to agencies they are potentially sharing data with. Any areas of the system to which the user is denied access are eliminated from view, providing a seamless user experience with any access role.

System administrators can define and create an unlimited number of access roles associated with varying access levels down to a granular level, including the field level. Access roles can also be defined on an agency basis, meaning that a participating agency can define the data they wish to share with other organizations down to the field level. These cross-agency access rights can be adjusted on an agency-by-agency basis (e.g., Agency A may share all of its client data with Agency B, selected data with Agency C, and no data with Agency D).

### PII Data Protection

Universally sensitive PII, such as a social security number, is automatically masked on the Clarity Human Services screen (i.e., blurred) so that neither the user nor a casual observer can obtain that information for undue purposes. Specific access roles can be created to permit/prohibit the user from revealing the social security number for editing purposes temporarily. Also, you can place privacy flags on sensitive data elements, notes, files, or entire client records to allow for the exclusion of individual data elements from general sharing/access agreements. **If necessary, the entire client profile can be de-identified and marked as fully private.**

**11. Functionality to ensure adequate reporting in accordance with any and all applicable local, state and federal laws regulations, policies, procedures and standards, including, without limitation: production of current standard United States Department of Housing and Urban Development reports, system performance measurement reports at both the program and Continuum of Care levels where applicable and quarterly program performance reports; generation of standard project and agency level reports that track enrollments, dismissals, demographics and other program-related statistics for funders and other stakeholders; and provision of user information that track user license periods, contact information, training and login activity, inclusion in metadata for client record creation and edit and name stamps on assessment submissions or updates.**

Clarity Human Services makes it simple to report in accordance with any and all applicable local, state, and federal laws, regulations, policies, procedures, and standards. All current HUD and Federal partner HMIS reports are available in the Report Library, built to the published federal specifications. They are well-documented and are kept up-to-date and in full compliance with standards. Clarity Human Services has over 175 pre-built reports available in its Report Library and ad hoc Data Analysis tool—all of which offer drill-down functionality to help ensure the data is valid. **These tools and reports allow communities to analyze aggregate data grouped by subject area, such as by CoC, program, client, or staff caseload.** Combined, they cover a wide range of common reporting needs, including client lists, demographics, data quality, and program performance.

### CoC-based Reporting

Both standard and ad-hoc reporting functionality allow users to generate reports at the client, program, agency, CoC (individual or multiple CoCs), and system levels. For example, authorized users can run a HUD System Performance Report for a specific program, an agency, a specific CoC (as per official specs), or the system as a whole (in instances with more than one CoC). Our reporting infrastructure is designed to handle large reports and exports—including reporting for multi-CoC systems and high-volume programs—on-demand, without special accommodations or procedures.

### Performance Measurement and Reporting Features

Clarity Human Services generates actionable insights into the homeless response system's performance and outcomes. Highly customizable data entry workflows and intuitive business intelligence tools make reporting at a client, project, and case manager level straightforward and accessible. Our reporting and database architecture provides opportunities for integration with mainstream systems of care, data warehouses, and agency-level case management systems for advanced needs.

Clarity Human Services includes several features that simplify the administration of programs/services with diverse reporting requirements and blended funding

streams. So, whether tracking outcomes for a federally-funded CoC program, a state-funded Housing Assistance Program (HAP) grantee, or a privately funded initiative, system administrators and agency managers are empowered with the tools required to customize and build upon the federal HMIS Data Standards to meet the requirements of virtually any funding source.

## Powerful Outcome Reporting and Analysis

Clarity Human Services' reporting and data analytics tools built directly into the application provide insight into your service ecosystem's operations and performance at the client, program, agency, CoC, and system levels.

- **Prebuilt Reports:** Clarity Human Services has over 175 prebuilt reports in its Report Library and Data Analysis tool—all of which offer drill-down functionality. Grouped by subject area, the Report Library covers a wide range of everyday reporting needs, including client lists, demographics, data quality, and program performance. A list of the reports included in the Clarity Human Services Report Library, including their full documentation, is available at <https://help.bitfocus.com/the-report-library>.
- **Data Analysis Tool:** The Clarity Human Service Data Analysis Tool provides robust custom reporting and data visualization tools directly integrated into the application. Built off a proven BI platform, the Data Analysis Tool delivers immediate access to client data in a highly configurable environment that supports custom fields, user-defined measures, and table calculations— without limitation to size, frequency, or date range. Using an intuitive drag-and-drop interface, users can quickly build, save, and share reports with fellow users. Most importantly, the Data Analysis tool is user-friendly, enabling authorized end-users to query necessary data on populations and extract information from form/assessment responses without advanced technical knowledge.
- **Data Model:** For advanced reporting and backup applications, Clarity Human Services supports direct access to a real-time replica of your client data, allowing you to run custom queries or connect third-party tools like Tableau® or PowerBI®.

## Presenting Data to Stakeholders

- **Custom Reports, Dashboards, and Exports:** Authorized users can use the Data Analysis tool to create reports, dashboards, and exports—including support for custom fields.
- **Public Dashboards:** The public data model in our Data Analysis Tools allows analysts to confidently create public-facing embedded dashboards, visualizations, reports, and queries while ensuring personally identifiable information will not be accessible from public-facing websites.
  - Limited-Access Credentials (Keeping third-party stakeholders in the loop): Our Data Analysis Tool allows for the creation of user accounts that limit the scope of the information available for

reporting and export, including restricting access to Personally Identifiable Information (PII). These limited-scope accounts allow access by third-party organizations while strictly controlling what external entities can access information. For example, funder- or grant-level access accounts could allow third-party organizations to see the impact of their participation firsthand by providing direct access to interactive reporting in a secure and controlled manner that protects PPI.

## System Auditing

Clarity Human Services provides complete auditing records on all areas connected to user interaction. These include a log of all user interactions, tracking what information was changed, who changed it, and when. With Clarity, you can also monitor database deletions, changes, and modifications. For data privacy and security reasons, the audit trails are available only to users with a System Administrator user license and can be accessed using two methods:

- **Audit Log Link:** On every page, an audit log is presented at the bottom right of the screen, visible only to authorized users. The audit log displays any updates made to any of the data on the form. Items such as old value, new value, date/time of the update, and the user who made the update are all historically presented in a concise format.
- **Database:** The audit log is also provided through the relational database, allowing the system administrator to access the data using a query tool or write reports to manage the updates in any way the system administrator defines. Here are some other data we collect for security auditing purposes.
  - Login date of every user login to the system
  - Length of time a user has been logged in for each session
  - History of all failed login attempts
  - History of client information accessed by a user
  - History of IP address(es) from which a user logged in/attempted to log in
  - Reports run/accessed by a user

## B. Provision of Technical Support, Training and Customer Services

**1. Providing technical documentation, including, without limitation, user manuals and online assistance, relevant to introductory training as well as ongoing support, regarding reporting module guidance, database design and navigation, workflow for entering client information and other aspects of Homeless Management Information System data entry.**

Bitfocus offers a variety of tools and modalities for Clarity Human Services training and technical support.

## Online Help Center

All staff has access to online system documentation, which can be found at [help.bitfocus.com](http://help.bitfocus.com). This online documentation is appropriate for users of all types, from volunteers to agency managers to system administrators. It contains helpful videos, how-tos, workflows, and other documentation to ensure that users of all levels feel confident when they use Clarity Human Services. This site also offers additional technical documentation, including a data dictionary, data schema, and custom reporting guidance.

## Learning Management System (LMS)

Bitfocus also offers a standalone Learning Management System (LMS), which is a dedicated site that provides access to a comprehensive curriculum of on-demand video training, with learning paths dedicated to various user roles and functional areas of the system. For more information or to view sample courses, visit [learn.bitfocus.com](http://learn.bitfocus.com). Additional training (post-implementation) can be secured through an SLA with our Professional Services Team.

## In-Application Support

Our in-app support widget provides instant access to relevant help desk articles and other resources, directly from within the Clarity Human Services interface.

## Technical Support for System Administrators

The Bitfocus Technical Support Team is industry-renowned for its excellence in customer care. This team is a unique collection of seasoned customer support experts who have an average of 8 years of customer support experience and have experience in the human services industry. Many have worked as caseworkers, case managers, and even system administrators. They know the unique challenges that users face and are eager to provide customized solutions. We offer end-to-end support from a variety of angles to make sure that your system administrators are confident users of Clarity Human Services.

- **Technical Support.** Our standard customer support hours are from 5 AM to 5 PM, Pacific Time, Monday through Friday. In the event that after-hours support is required, we can establish an SLA to cover after-hours support. We also operate an extensively automated infrastructure monitoring system, which ensures that the platform's environment is always operational and available. Our engineering team is immediately notified if an issue does arise, which further ensures that emergencies are minimized.
- **Dedicated Account Manager.** In addition to our standard help desk and training resources, each community is assigned a single point of contact with our Customer Success team. Your Bitfocus Best Friend acts as your community's personal advocate and guide to many resources and services available to Clarity Human Services customers. They'll keep a tab on your system and support tickets, and they'll proactively check in throughout the

duration of the contract to make sure you're getting the most out of your Clarity Human Services implementation.

- **System Documentation.** The Clarity Human Services Help Center ([help.bitfocus.com](https://help.bitfocus.com)) includes full documentation, how-to guides, videos, and other resources to help communities maximize the return on their investment. This site also offers additional technical documentation, including a data dictionary, data schema, and custom reporting guidance.

## **2. Providing “Train the Trainer” modules related to implementation of the Homeless Management Information System and standard ongoing training.**

### **System Administration and Train-the-Trainer Courses**

We know how the system administrator keeps the gears in motion for the entire system. That's why we ensure all system administrators get the training they need to support system, project, and service setup, and train their users. We will provide the entire Humboldt County system administration team with full system administration training and a train-the-trainer session, delivered via on-demand online training videos, to prepare the Humboldt County team to facilitate the General User Training in a live environment. There is no trainee limit for system administrators; an unlimited amount of system administrators can train concurrently.

Just like its design, Clarity Human Services training is also rooted in the user experience. Our Learning and Development team partners with our own system administrators to create in-depth content to ensure your system administrators will get the most out of our powerful software. The Bitfocus training development process (both pre-and post-implementation) emphasizes pedagogically sound instructional design rooted in Adult Learning Theory and continuous refinement and revision. The standard Clarity Human Services on-demand training package is powered by our Learning Management System (LMS), which includes a comprehensive library of video training courses and materials in addition to the System Administrator Training and the Train-the-Trainer training. If more training support is needed, Bitfocus offers various training packages for additional fees. Packages include live remote training or live in-person training.

### **Report Builder Training**

Our online Learning Management System (LMS) includes a reporting training curriculum called Report Builder, which includes a set of resource courses to get your system administrators set up for reporting success. The curriculum covers topics such as Data Quality Reports, Looker/Data Analysis Models Overview, and the importance of clean data. This certification will cover general Clarity Human Services reporting how-tos for both the Report Library and Data Analysis Tool, but it is not training on how to be a data analyst or how to learn report building in general.

Bitfocus offers extensive online report documentation for the Clarity Human Services prebuilt reports and the ad hoc Data Analysis Tool. We aim each section at various audiences and consistently update the content in response to feature upgrades. Where relevant, these resources include sample reports, screen illustrations, and step-by-step instructions. Bitfocus also uses animated GIFs and videos for training, guaranteeing a pleasant and thorough learning experience.

Bitfocus provides documentation on each table in Clarity Human Services, including descriptions for each field, all keys, and sample SQL Queries of each table in practical use. Our learning management system (LMS) provides access to a comprehensive curriculum of on-demand training, with learning paths dedicated to various user roles and functional areas. For more information or to view sample courses, visit [learn.bitfocus.com](https://learn.bitfocus.com).

System administrators will receive comprehensive training in the train-the-trainer sessions during the implementation phase. However, should they ever need additional support or guidance, they can contact our help desk, which has agents standing by, or they can independently consult the available documentation in the online library.

### **3. Providing online customer support that allows for straightforward issue reporting and bug tracking.**

#### **Customer Service for System Administrators**

The Bitfocus Technical Support team is industry-renowned for its excellence in customer care. This team is a unique collection of seasoned customer support experts who have years of customer support experience and experience in the human services industry. Many have worked as caseworkers, case managers, and even HMIS system administrators. They know the unique challenges that your users face and are eager to provide customized solutions.

We offer end-to-end support from a variety of angles to make sure that users of all levels are confident in using Clarity Human Services.

- **Technical Support:** Our standard customer support hours are from 5 am to 5 pm, Pacific Time, Monday through Friday. In the event that after-hours support is required, we can establish an SLA to cover after-hours support. We also operate an extensively automated infrastructure monitoring system, which ensures that the platform's environment is always operational and available. Our engineering team is immediately notified if an issue does arise, which further ensures that emergencies are minimized.
- **Dedicated Account Manager:** In addition to our standard help desk and training resources, each community is assigned a single point of contact with our Customer Success team. Your Bitfocus Best Friend acts as your community's personal advocate and guide to many resources and services available to Clarity Human Services customers. They'll keep a tab on your system and support tickets, and they'll proactively check in throughout the

duration of your contract to make sure you're getting the most out of your Clarity Human Services implementation.

- **System Documentation:** The Clarity Human Services Help Center ([help.bitfocus.com](http://help.bitfocus.com)) includes full documentation, how-to guides, videos, and other resources to help communities maximize the return on their investment. This site also offers additional technical documentation, including a data dictionary, data schema, and custom reporting guidance.

## Feature Enhancements, Issues, Errors, and System Bugs

### Issue Tracking and Response

An email confirmation of a support ticket is sent automatically when a ticket is received in the queue. Standard technical support hours are from 5 AM to 5 PM Pacific Time, Monday through Friday. Most of the basic to intermediate level user support tickets (i.e., forgot password, etc.) are fully resolved within 2-4 hours; however, certain more advanced requests may take longer. System administrators can view the status and full history of all support tickets for their community.

### System Bugs

We have a well-established and timely protocol for fixing system errors and bugs, and most are resolved within a day or two. Fixes are prioritized based on severity level, with the most severe errors being prioritized first.

## **4. Developing and implementing quality assurance protocols that are designed to ensure that the timing, description and communication related to every upgrade, release, enhancement or other change to the Homeless Management Information System are coordinated in an efficient manner.**

Clarity Human Services operates on a single codebase with updates released 5–6 times per year to introduce new features and maintain HUD compliance. We take every effort to test all code before release thoroughly. We use a combination of automated scans, live testing, and internal peer-review to evaluate release candidates.

All customizations in the system are maintained through the upgrade path. However, in instances of official changes to HUD Data Standards, our Professional Services Team will create the screens, forms, assessments, and reports necessary for you to remain compliant, and these will be added to the system as part of a system upgrade. We fully prepare and inform our customers of such changes well ahead of time, and leave the legacy screens, forms, and assessments available in the system post-upgrade.

From there, general patches, upgrades, and feature enhancements are deployed using our standard update process:

### 1. Customer Notification

First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality well in advance. We also host a webinar to demo most releases.

## 2. Training Environment/User Testing

Next, updates are pushed to our customer training environments to allow users to use and test the changes before applying to the production environment. This testing period typically lasts several weeks to ensure optimal adjustment.

## 3. Production Launch

Finally, updates are pushed to production environments and available to end-users.

There is no downtime associated with most updates and no effort required on the system administrators' part. When necessary, sufficient notice is provided before downtime, and updates are pushed during non-business hours.

# Project Development

**The County expects that the Successful Proposer will work collaboratively with DHHS – Social Services to plan, and organize information pertaining to, the provision of the Homeless Management Information System required pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process, including, without limitation, participating in planning sessions and regular meetings. The Successful Proposer will be required to maintain timely and regular communication with the DHHS – Social Services throughout the term of the final Professional Services Agreement resulting from this RFP process.**

## Bitfocus Standard Onboarding Plan

Our standard onboarding plan ensures that system setup, training, and initial deployment are expeditious and effective. The exact timeline for software implementation will be determined once due diligence can be conducted with Humboldt County staff. We estimate that the standard implementation period will be 5 to 6 months to go-live with HUD data and another 6 to 8+ months for custom data.

Onboarding generally happens in five phases:

1. Getting Started: Kickoff and Planning
2. Training
3. System Mapping and Configuration
4. HUD Data Migration
5. Going Live with Clarity
6. Custom Data Migration

Once you go live, we'll work with you on your custom migrations. During each phase of onboarding, we will all have roles to play.

## Kickoff and Planning

Before contract finalization, the local team will meet with the Bitfocus team to discuss the high-level phases of onboarding, project timelines, establish priorities, and answer questions. After the contract has been signed, we'll immediately host a kickoff call and work with you to finalize the project plan.

### **Training**

During the training phase, we'll provide access to the video training content in our LMS. Your administration team will have access to these materials throughout the duration of the contract so that you can use them as resources when building out your own staff and user training and so that you can continue to learn more about Clarity.

### **System Mapping and Configuration**

During the system configuration phase, we'll provide you with configuration tools and instructions. We'll provide an overview of how to configure your system, and while you're working on the configuration, we'll provide support along the way. Bitfocus will lead the local system administration team through Clarity Human Services system mapping, training, configuration, data quality reviews, data migration, and User Acceptance Testing.

Bitfocus will not configure your Clarity Human Services system. Instead, our team will provide project management, training, consultation, and resources to support the decision-making process. Once trained, your system administrators will perform the system configuration with our guidance with the goal of empowering them to feel confident in their abilities to autonomously configure the Clarity Human Services system to meet the continuum's needs. Of course, the CoC will still have robust support through a dedicated team of project managers and specialists to ensure a successful onboarding process.

- **Implementation Guidance:** Our implementation team will work with local administrators to provide expert guidance as they configure the system. This includes instruction on the completion of inventory spreadsheets of all programs and services within the HMIS, as well as instruction on best practices for Clarity Human Services program/service nomenclature and categorization.
- **Agency System Configuration Guidance:** Bitfocus implementation staff will virtually meet system administrators to instruct them and help plan the configuration of their agencies in Clarity Human Services.
- **Program & Service Configuration Guidance:** Bitfocus implementation staff will instruct system administrators on proper Program and Service configuration for new or existing agencies, allowing agencies to appropriately enter client data within their configuration.

By the end of the training and implementation, your administrative staff will feel fully confident in their ability to configure the system, train system users, and create reports and dashboards.

### **Data Migration**

The HUD data migration phase is typically the longest part of onboarding because it can take time to get your data where you want it to be before it's imported into your new Clarity Human Services instance. It's typically an iterative process where 1) we review and provide an analysis of your data files; 2) you make decisions around data quality and clean up, clean up your data, and then provide us with new files; and 3) we then review and provide an updated analysis, and so on.

Once the CoC extracts its data from its current system(s) and provides Bitfocus with an export of the legacy data to be imported into Clarity Human Services, we will provide robust assistance with data preparation and data migration. We will lead the community through an iterative process where we typically:

1. Review and provide an analysis of your data files using machine learning algorithms.
2. Help you make informed decisions around data quality and clean-up.
3. Consult with you as you clean up your data.
4. After you provide us with newly cleaned files, we will then review those files and provide updated analysis and so on, until the data is ready for migration.

Most HUD data migrations are completed in 6 months. That said, every community is different—some move a little faster, and others need a bit more time. We look forward to building a project plan that works best for Humboldt County.

A typical migration timeline is as follows:

- Bitfocus will need to receive all data that needs to be migrated as part of the scope of this project. We will review these exports in-depth and provide you with a detailed report on any data quality issues we discover.
- Data will be migrated to a dedicated testing site for your review. To facilitate testing, the migration site includes full reporting, data analysis, and direct database access functionality.
- Once it is migrated into the test site, the data will be tested thoroughly to identify all issues or data adjustment needs prior to it being migrated to the live instance.

### **Go Live!**

The most exciting part of onboarding is the go-live phase. During this phase, we'll be migrating data into your live site. Once your data has finished migrating, your community will begin using Clarity. Then, it's time to celebrate!

### **Custom Data Migration**

The last part of onboarding is the import of your custom data. The process is much like the HUD data migration, but it requires more decisions about the data you

want to bring into the new system and will also require new scripts and mapping documents.

Please see the table below for a summary of this onboarding process.

## Onboarding Plan

Phase	Timeline	Bitfocus Tasks	Customer Tasks
1. Getting Started	Month 1	<ul style="list-style-type: none"> <li>• Kick-off call</li> <li>• Finalize project plan</li> </ul>	<ul style="list-style-type: none"> <li>• Timeline decisions</li> </ul>
2. Training	Start in Month 1 (ongoing access to training materials)	<ul style="list-style-type: none"> <li>• Provide training content</li> </ul>	<ul style="list-style-type: none"> <li>• Complete training</li> </ul>
3. System Configuration	Months 2-5	<ul style="list-style-type: none"> <li>• Provide configuration tools</li> <li>• Conduct “how to” sessions</li> <li>• Configuration support</li> </ul>	<ul style="list-style-type: none"> <li>• Configure system</li> </ul>
4. HUD Data Migration	Months 3-6 (approximately)	<ul style="list-style-type: none"> <li>• Review of imports</li> <li>• Analysis reports</li> <li>• Automated data cleanup</li> </ul>	<ul style="list-style-type: none"> <li>• Data cleanup decisions</li> <li>• Data cleaning</li> <li>• Data testing</li> </ul>
5. Go Live!	Month 6 (approximately)	<ul style="list-style-type: none"> <li>• Final migration</li> <li>• Celebrate!</li> </ul>	<ul style="list-style-type: none"> <li>• Blackout period</li> <li>• Final migration testing</li> <li>• Celebrate!</li> </ul>
6. Custom Data Migration(s)	Month 7+	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Review of imports</li> <li>• Analysis reports</li> </ul>	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Data cleanup decisions</li> <li>• Data cleanup</li> </ul>

		<ul style="list-style-type: none"><li>Automated data cleanup</li></ul>	<ul style="list-style-type: none"><li>Data testing</li></ul>
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## Eligibility Requirements

### Mandatory Qualifications

**1. Proposers must have two (2) or more years of experience providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP to other public entities.**

We have 20 years of HMIS system administration experience and 11 years of experience as an HMIS vendor, providing services to public entities.

**2. Proposers must have extensive knowledge of, and the ability to comply with any and all local, state and federal laws, regulations, policies, procedures and standards applicable to the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP, including, without limitation, any and all applicable confidentiality, security and privacy requirements set forth in the California Confidentiality of Medical Information Act, the United States Health Information Technology for Economic and Clinical Health Act and the United States Health Insurance Portability and Accountability Act of 1996 and any and all applicable data collection, management and reporting requirements established by the United States Department of Housing and Urban Development, all as may be amended from time to time.**

As not just a software developer but also a system administrator, Bitfocus is fully committed to ongoing compliance with all HUD and federal partner regulations out of necessity. But, beyond our own need for compliance, we also legally guarantee this compliance through contractual commitments in all of our standard agreements. We will maintain full compliance with current Data Standards, Programming Specifications, and other HMIS policies and regulations established by HUD and its federal partners. Additionally, we serve as the HMIS vendor for the majority of California CoCs, and we serve as the system administrator for several of them. As such, we are extremely well-versed in maintaining compliance with California-specific requirements and various confidentiality rule requirements.

Please see Section B., question 2 for more information.

**3. Proposers must possess, or have the ability to obtain, any and all resources necessary to provide a Homeless Management Information System with capabilities equivalent to those set forth in this RFP**

Clarity Human Services is a Software as a Service (SaaS) product, purposefully designed to be a Homeless Management Information System (HMIS). We have

been providing this HMIS product since 2012. It contains the capabilities equivalent to those set forth in this RFP.

**4. Proposers must employ an adequate number of qualified professional staff to ensure the efficient and effective provision of a Homeless Management Information System with capabilities equivalent to those set forth herein in accordance with the terms and conditions of the final Professional Services Agreement resulting from this RFP process.**

We have a dedicated full-time staff of 100+ employees. Across specialties, Bitfocus staff are experts in their fields. Many team members formerly worked as homeless services caseworkers, policy staff, or HMIS system administrators. They're experienced in technology, data, the human services industry, and HMIS. They know the unique challenges that your end-users face and are eager to offer friendly, customized solutions.

For a more specific example, we staff our help desk with experienced CoC and HMIS experts--and it makes a difference. Our customers are happy with our Technical Support team, which we can see from our help desk averaging a 98.5%+ satisfaction rating.

**5. Proposers must not have a record of unsatisfactory performance, illegal activity, lack of integrity or poor business ethics.**

Neither Bitfocus nor any of its principal officers have been involved in any litigation in connection with any contract. We pride ourselves on our integrity and high ethical standards.

## Preferred Qualifications

**1. The Proposer has five (5) years of experience providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP to other public entities.**

We have 11 years of experience as a vendor providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP to other public entities, and we have 20 years of experience in HMIS system administration.

**2. The Proposer has the ability to start providing services pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process on or before April 1, 2024.**

Yes, we can start providing services pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process on or before April 1, 2024.

# 6.0 Cost Proposal

## Bitfocus Cost Proposal

Item & Description	Quantity	Unit Price	Total
<b>Platform License: Clarity Human Services Community Edition</b> The full version of Clarity Human Services. Features unlimited program/project support, agency management, customizable fields, and Coordinated Entry functionality. This version supports multiple Continuums of Care (CoC) or multiple agencies/organizations.	1	\$7,200.00 / year	\$7,200.00 / year for 5 years
<b>Agency Licenses</b> Each organization with distinct programs and services requires an Agency license. The first Agency License is included.	10	\$120.00 / year	\$1,080.00 / year after \$120.00 discount for 5 years
<b>Administrator Users</b> Includes all the abilities of the Enterprise and Manager licenses, while also granting the authority to customize all aspects of the system.	2	\$1,800.00 / year	\$3,600.00 / year for 5 years
<b>Enterprise Users</b> Includes access to Clarity's core functionality, such as case/client management, program enrollments, and service provision. Also allows the use of canned reports (as determined by access role).	58	\$780.00 / year	\$31,320.00 / year after \$13,920.00 discount for 5 years
<b>User Add-On: Data Analysis (Standalone User)</b> Allows for advanced business intelligence queries and exports, as well as access to the Data Analysis API. Includes Data Analysis Embedded user license; API rate limits apply.	2	\$1,200.00 / year	\$2,400.00 / year for 5 years
<b>User Add-On: Data Analysis (Embedded User)</b> Allows for easy data mining and data analysis using intuitive drag-drop functionality -- right from Clarity's interface.	10	\$120.00 / year	\$1,200.00 / year for 5 years
<b>Data Import Tool (DIT)</b> Allows for importing HUD XML and CSV files into the Clarity Human Services platform. Supports the import of custom XML-schema files, as well.  Also includes: - Migration site for testing	1	\$7,200.00 / year	\$7,200.00 / year for 5 years

- Embedded Looker license for migration site (if already paying for Looker in live site) - 1 copy of live site data to migration site for testing (no cost); additional copies \$500 each - Help Center documentation - Help Desk assistance for support using the DIT			
<b>Training Site License</b> A private Clarity training site. This provides a separate environment for training purposes.	1	\$3,000.00 / year	\$3,000.00 / year for 5 years
<b>License Activation: Administrator</b>	2	\$300.00	\$0.00 after 100% discount
<b>License Activation: Enterprise</b>	58	\$175.00	\$0.00 after 100% discount
<b>Data Migration from Legacy System</b> Migration of legacy data from the current HMIS implementation to Clarity Human Services using the standard HUD and Bitfocus CSV schema. Billed as a flat-rate package.	1	\$40,000.00	\$40,000.00
<b>Standard Implementation Support</b> Implementation support package. Includes guidance with planning, configurations, and coordination with the data migration (if applicable) and training teams.	1	\$20,000.00	\$20,000.00
<b>On-Demand Training Access for Licensed System Administrators</b> Access to the entire Bitfocus LMS training library, including System Administrator, Agency Management, General Training, and End-User Train-the-Trainer training sessions.	1	\$1,500.00	\$0.00 after 100% discount

**Annual subtotal: \$57,000.00**  
after \$14,040.00 discount

**One-time subtotal: \$60,000.00**  
after \$12,250.00 discount

**Total \$117,000.00 (year one)**

**Note:** License activation fees are discounted 100% assuming the County of Humboldt signs a five-year contract with Bitfocus. If the County signs for less than five years, the license activation fees will be discounted by 50%.

[Download the quote by clicking here.](#)

# 7.0 Supplemental Documentation

## Bitfocus Onboarding Project Team Example

*This is an example of a current Bitfocus team working with a new CoC customer and helping to manage their onboarding process and data migration from a legacy vendor to Clarity Human Services. While the staffing may not be the exact same for Humboldt County, this is an example of the staff structure and expertise that Humboldt County could expect to be working with them during their onboarding process.*

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### Customer Success

#### **EMMA NUNN - ACCOUNT MANAGER**

Emma is a Customer Success Account Manager, also known as a Bitfocus BFF by her customers. She has over six years of experience in the homelessness field and nine years in the social services space. She is a subject matter expert in Clarity Human Services software, continuum of care activities, and data analysis. In her previous role on the Professional Services team, she engaged in system management, quality assurance, data analytics, and system configuration to meet local client objectives. Through sharing her knowledge, she has empowered many of our customers to achieve data-driven results. Emma has also been a part of our Help Desk team, where she provided support and resolution for over 3300 Clarity Help Desk tickets. Emma has a bachelor's degree in Natural Sciences from UC Davis.

#### **CLAY BOYKIN - ACCOUNT MANAGER**

As a Customer Success Project Manager on the Customer Experience team, Clay Boykin brings over four years of experience as the HMIS Lead for the Louisiana Balance of State Continuum of Care. In this role, Clay was responsible for overseeing the development and administration of the largest geographic HMIS in the state of Louisiana. Clay also has a strong understanding of CoC policy pertaining to Coordinated Entry and developed and maintained the CoC's prioritization list, including sending over 1000 housing referrals annually for CoC, ESG, and other federally funded programs. Additionally, Clay is experienced in writing federal grant applications.

### Professional Services

#### **ASHLEY WYNN - PROJECT MANAGER**

As a Project Manager on the Professional Services Team, Ashley brings seven years of HMIS leadership experience and expertise in various federal assistance programs. She has a passion for leveraging data and technology to address complex social issues and maximize coordination across systems of care. Prior to joining Bitfocus, Ashley was the HMIS Manager for the CoC and HMIS Lead for the Tampa/Hillsborough County CoC. Ashley also has valuable past experience with direct services and nonprofit leadership through managing permanent

supportive housing and serving as president for the National Alliance on Mental Illness (NAMI) in Hillsborough County, FL.

**ALLIE SEBASTIAN - PROJECT MANAGER**

As a project manager on the Professional Services team, Allie brings 9 years of experience working in homeless services and has supervised numerous housing projects. Allie has 4 years in grant and contract management where she managed over 9 million dollars in city, county, state, and federal funding for Hillsborough County and the Lead Continuum of Care. Allie also spearheaded the implementation of a new Coordinated Entry System for Tampa/Hillsborough County. Along with her professional experiences, Allie also has a Master of Social Work Degree, and is a Licensed Clinical Social Worker in the state of Florida. Allie is passionate about people, mental health, and putting an end to homelessness.

## 8.0 References

**REQUEST FOR PROPOSALS NO. DHHS2023-03  
HOMELESS MANAGEMENT INFORMATION SYSTEM  
ATTACHMENT C – REFERENCE DATA SHEET  
(Submit with Proposal)**

<b>REFERENCE DATA SHEET</b>	
Provide a minimum of two (2) references with name, address, contact person and telephone number whose scope of business or services is similar to those of Humboldt County (preferably in California). Previous business with the Humboldt County does not qualify.	
<b>NAME OF AGENCY:</b>	Regional Task Force on the Homeless – San Diego Continuum of Care
<b>STREET ADDRESS:</b>	4699 Murphy Canyon Rd Suite 106
<b>CITY, STATE, ZIP:</b>	San Diego, CA 92123
<b>CONTACT PERSON:</b>	Tamera Kohler <b>EMAIL:</b> tamera.kohler@rtfhsd.org
<b>PHONE #:</b>	(858) 292-7627 x40 <b>FAX #:</b> N/A
<b>Department Name:</b>	
<b>Approximate County (Agency) Population:</b>	
<b>Number of Departments:</b>	
<b>General Description of Scope of Work:</b>	This implementation covers the full suite of HMIS-related care (homeless services, case management, coordinated entry, etc.). They consistently operate more than 100 projects and have over 800 users. Implementation date: 2018

<b>NAME OF AGENCY:</b>	Community Action Partnership of Kern – Bakersfield/Kern County CoC	
<b>STREET ADDRESS:</b>	5005 Business Park North	
<b>CITY, STATE, ZIP:</b>	Bakersfield, CA 93309	
<b>CONTACT PERSON:</b>	Rebecca Moreno	<b>EMAIL:</b> rmoreno@capk.org
<b>PHONE #:</b>	661-379-8221	<b>FAX #:</b> N/A
<b>Department Name:</b>		
<b>Approximate County (Agency) Population:</b>		
<b>Number of Departments:</b>		
<b>General Description of Scope of Work:</b>	This implementation covers the full suite of HMIS-related care (homeless services, case management, coordinated entry, etc.). 140+ users.	
<b>Applicant Tracking System Implementation Date:</b>	Implementation Date: 2019	
<b>NAME OF AGENCY:</b>	Washington State Department of Commerce - Washington BoS CoC	

<b>STREET ADDRESS:</b>	1011 Plum Street SE P.O. Box 42525	
<b>CITY, STATE, ZIP:</b>	Olympia, WA 98504	
<b>CONTACT PERSON:</b>	Talia Scott	<b>EMAIL:</b> talia.scott@commerce.wa.gov
<b>PHONE #:</b>	360-688-4534	<b>FAX #:</b> N/A
<b>Department Name:</b>		
<b>Approximate County (Agency) Population:</b>		
<b>Number of Departments:</b>	This implementation covers the full suite of HMIS-related care (homeless services, case management, coordinated entry, etc.). They consistently	
<b>General Description of Scope of Work:</b>	operate more than 100 projects and have over 800 users. Implementation Date: 2016	

### Two Former Customers

Note: We have only lost one HMIS customer, so they are included below, plus a small single agency that is a former customer.

#### Tehama/Lake County Continuum of Care

Andrea C. Curry  
 CoC Coordinator/HMIS Administrator  
 info@tehamacoc.org  
 (707) 274-9101

#### The Health Trust

Rachel Poplack  
 Director of Strategy  
 408-513-8700  
 rachelp@healthtrust.org



SECRETARY OF STATE



**NEVADA STATE BUSINESS LICENSE**

**BITFOCUS, INC.**

**Nevada Business Identification # NV20031461398**

**Expiration Date: 09/30/2023**

In accordance with Title 7 of Nevada Revised Statutes, pursuant to proper application duly filed and payment of appropriate prescribed fees, the above named is hereby granted a Nevada State Business License for business activities conducted within the State of Nevada.

Valid until the expiration date listed unless suspended, revoked or cancelled in accordance with the provisions in Nevada Revised Statutes. License is not transferable and is not in lieu of any local business license, permit or registration.

**License must be cancelled on or before its expiration date if business activity ceases. Failure to do so will result in late fees or penalties which, by law, cannot be waived.**



IN WITNESS WHEREOF, I have hereunto set my hand and affixed the Great Seal of State, at my office on 09/02/2021.

*Barbara K. Cegavske*

Certificate Number: B202109021965090

You may verify this certificate online at <http://www.nvsos.gov>

BARBARA K. CEGAVSKE  
Secretary of State

# 10. Exceptions, Objections and Requested Changes

## Bitfocus Exceptions to Contract

**#1 General Exception Note from Bitfocus:** We will need to include a copy of our [Bitfocus Master Services Agreement](#) as a part of the contract, as well. It includes additional terms around confidential information. If there are conflicting contract terms, the Bitfocus Master Services Agreement (MSA) sets the base terms; then Humboldt's contract, which would override the MSA where it conflicted; and, lastly, any purchase terms or exceptions we note from there, which would presumably override both. Our MSA can be found at [bitfocus.com/msa](http://bitfocus.com/msa).

**#2 7. Reports states:** *CONTRACTOR hereby agrees to provide COUNTY with any and all reports that may be required by any local, state and/or federal agencies for compliance with this Agreement. CONTRACTOR shall submit one (1) hard copy and one (1) electronic copy of any and all reports required pursuant to the terms and conditions of this Agreement in a format that complies with the Americans with Disabilities Act and any other applicable local, state and federal accessibility laws, regulations and standards. Any and all reports required pursuant to the terms and conditions of this Agreement shall be submitted in accordance with any and all applicable timeframes using the format required by the State of California as appropriate.*

**Bitfocus Exception:** Although we can (and do) commit to providing all required HUD and Federal Partner reports, as defined by the HUD HMIS Data Standards, it is the COUNTY's responsibility to generate, distribute, and submit these reports absent a separate agreement with Bitfocus (e.g., a community administration or professional services package).

**#3 28. TITLE TO INFORMATION AND DOCUMENTS section**

**Bitfocus Exception:** Either remove this section OR clarify that this does not apply to prior works, including the Clarity Human Services application and all reports, software, documents, and other works not prepared specifically for COUNTY.

**#4 3. PLACE OF PERFORMANCE section**

**Bitfocus Exception:** Unless specified otherwise, all services are provided remotely and delivered online.

## Other Requested Change

**Insurance Requirement Note:** Please confirm that you, County of Humboldt, can waive the XCU requirement as Bitfocus will be providing a technology-based service only.



RFP No. DHHS 2023-03 Homeless Management Information System  
County of Humboldt

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FOR MORE INFORMATION, CONTACT:  
Cameron Shorkey,  
Director of Business Development  
[camerons@bitfocus.com](mailto:camerons@bitfocus.com)

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